SENIORS' HOUSING REPORT
Saskatchewan

CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2017

Highlights

- The overall vacancy rate for a standard space in retirement homes in Saskatchewan declined from 10.6% in 2016 to 10.3% in 2017.
- The decline can be attributed to a sharp reduction in vacancies for standard spaces in the Regina Census Metropolitan Area (CMA), from 11.2% in 2016 to 6.8% in 2017. Meanwhile, the Saskatoon CMA and the rest of Saskatchewan both saw their vacancy rates increase in 2017 from the previous year.

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Figure 1

Source: CMHC

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Previous Seniors' Housing Reports were mainly descriptive. In an effort to produce a more meaningful report, the text in the report has been shortened to focus only on key highlights while continuing to give you the data tables you have always received. An optional spotlight section focusing on topics related to the Seniors' Housing Market is included in some reports.

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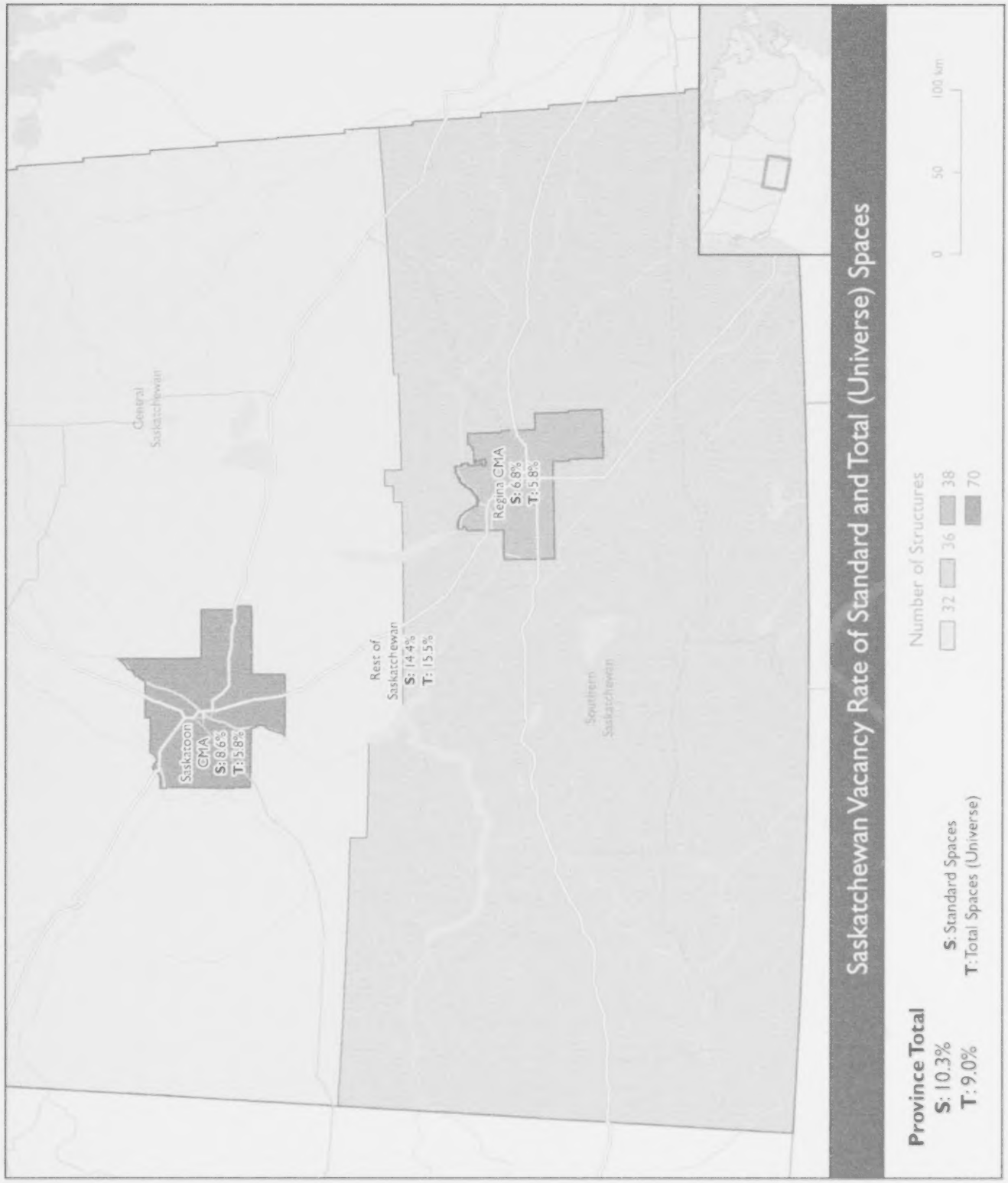
Saskatchewan Vacancy Rate of Standard and Total (Universe) Spaces
Province Total
S: 10.3%
T: 9.0%
S: Standard Spaces
T: Total Spaces (Universe)
Number of Structures
32
36
38
70
0
50
100 km
Saskatoon CMA
S: 8.6%
T: 5.8%
Regina CMA
S: 6.8%
T: 5.8%
Rest of Saskatchewan
S: 14.4%
T: 15.5%
Central Saskatchewan
Southern Saskatchewan

- A total of 176 seniors' residences were included in the 2017 survey, compared to 177 in 2016. Nonetheless, the number of residents increased 1.7% to 6,866 seniors in 2017 from 6,751 in 2016. Correspondingly, the capture rate rose to 8.6% in 2017 from 8.5% in the previous year.
- The overall monthly rent in Saskatchewan for a standard space increased to $2,880 in 2017 from $2,768 in 2016. The additional amenities and services provided in seniors' residences typically push rents above those in the purpose-built rental market. As well, residences opened in 2000 or later attracted the highest average monthly rent for a standard space in the province.

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
Saskatchewan

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Regina CMA	**	**	9.8	6.2	12.3	7.7	11.6	5.1	11.2	6.8
Saskatoon CMA	**	**	9.7	11.0	6.5	7.8	7.3	2.3	8.2	8.6
Rest of Saskatchewan	**	**	12.5	13.5	11.6	16.3	**	11.5	12.7	14.4
Saskatchewan	****	****	**11.2**	**11.3**	**9.2**	**9.6**	**9.8**	**5.1**	**10.6**	**10.3**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates of Standard Spaces (%) by Rent Range ($)
Saskatchewan

Centre	Less than $1,500		$1,500 - $1,999		$2,000 - $2,499		$2,500 - $2,999		$3,000 and More	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Regina CMA	**	**	**	**	6.3	2.7	9.3	3.5	10.9	7.6
Saskatoon CMA	1.3	4.0	4.2	13.6	12.9	6.2	11.5	14.8	8.6	7.2
Rest of Saskatchewan	**	**	13.1	15.5	15.9	18.5	11.4	11.6	7.1	9.5
Saskatchewan	**5.9**	**7.9**	**11.0**	**14.9**	**13.9**	**13.0**	**11.0**	**11.3**	**9.3**	**7.8**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

The following letter codes are used to indicate the reliability of the estimates:
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1.3 Vacancy Rates (%) and Average Rents ($) of Heavy Care Spaces[1] Saskatchewan

Centre	Vacancy Rate		Average Rent	
	2016	2017	2016	2017
Regina CMA	0.8	0.0	4,615	4,745
Saskatoon CMA	65.5	**	**	**
Rest of Saskatchewan	8.3	16.8	**	**
Saskatchewan	**11.5**	**7.8**	**4,464**	**4,624**

[1] Non-market heavy care units are excluded from Average Rents, but are included in Vacancy Rate.

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%) Saskatchewan

Centre	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2016	2017				
Regina CMA	1,510	9.6	5.8	38	1,541		
Saskatoon CMA	3,139	6.6	5.8	70	3,292		
Rest of Saskatchewan	2,300	12.5	15.5	68	2,034		
Saskatchewan	**6,949**	**9.2**	**9.0**	**176**	**6,866**	**79,700**	**8.6**

[1] Source: Statistics Canada. Table 052-0005 - Projected population, by projection scenario , age and sex, as of July 1, Canada, provinces and territories, annual (persons),CANSIM

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

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2.1 Universe of Total Spaces by Unit Type
Saskatchewan

Centre	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Regina CMA	713	676	121	1,510
Saskatoon CMA	1,089	1,714	336	3,139
Rest of Saskatchewan	1,603	570	127	2,300
Saskatchewan	**3,405**	**2,960**	**584**	**6,949**

2.2 Universe by Unit Type
Saskatchewan

Centre	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Regina CMA	**713**	**676**	**121**	**1,510**
Standard Spaces	500	626	118	1,244
Non-Standard Spaces	188	50	3	241
Unknown Spaces	25	-	-	25
Saskatoon CMA	**1,089**	**1,714**	**336**	**3,139**
Standard Spaces	719	873	171	1,763
Non-Standard Spaces	180	679	145	1,004
Unknown Spaces	190	162	20	372
Rest of Saskatchewan	**1,603**	**570**	**127**	**2,300**
Standard Spaces	1,248	435	79	1,762
Non-Standard Spaces	327	24	4	355
Unknown Spaces	28	111	44	183
Saskatchewan	**3,405**	**2,960**	**584**	**6,949**
Standard Spaces	2,467	1,934	368	4,769
Non-Standard Spaces	695	753	152	1,600
Unknown Spaces	243	273	64	580

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2.3 Universe of Standard Spaces by Rent Range ($)
Saskatchewan

Centre	Less than $1,500	$1,500 - $1,999	$2,000 - $2,499	$2,500 - $2,999	$3,000 and More
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Regina CMA	**	0.7	8.9	11.4	78.9
Saskatoon CMA	11.3	12.1	16.4	14.6	45.6
Rest of Saskatchewan	2.5	20.0	32.1	20.0	25.4
Saskatchewan	**5.3**	**12.2**	**20.4**	**15.8**	**46.4**

[1] % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care).

2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size
Saskatchewan

Centre	Meals				On-Site Medical Services	On-Site Nursing Services[2]	24-Hour Call Bell	Pharmacy
	Optional	# of Meals Included in Rent						
		1	2	3				
Regina CMA	2.8	0.0	5.6	91.7	50.0	52.8	91.7	5.6
10 - 49	3.7	0.0	0.0	96.3	**	55.6	88.9	0.0
50 - 89	**	**	**	**	**	**	**	**
90 or more	**	**	**	**	**	**	100.0	**
Saskatoon CMA	13.6	10.6	0.0	75.8	37.9	34.8	78.8	3.0
10 - 49	2.2	4.3	0.0	93.5	39.1	41.3	87.0	0.0
50 - 89	**	**	**	**	**	**	88.9	**
90 or more	**	**	**	**	**	**	**	**
Rest of Saskatchewan	1.6	0.0	3.1	95.3	31.5	31.4	85.7	0.0
10 - 49	2.1	0.0	2.0	95.9	28.3	28.3	85.6	0.0
50 - 89	**	**	8.6	91.4	**	**	82.3	**
90 or more	**	**	**	**	**	**	**	**
Saskatchewan	**6.7**	**4.2**	**2.4**	**86.7**	**38.0**	**37.4**	**84.2**	**2.4**
10 - 49	2.5	1.6	0.8	95.1	35.9	39.1	86.8	0.0
50 - 89	13.6	9.1	4.3	73.0	**	**	86.6	0.0
90 or more	23.8	14.3	9.5	52.4	**	23.8	66.6	**

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] On-site nursing services include RN, RPN or LPN.

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2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size
Saskatchewan

Centre	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Regina CMA	**	8.3	22.2	25.0	**	47.2
10 - 49	14.8	0.0	7.4	7.4	14.8	**
50 - 89	**	**	**	**	**	**
90 or more	100.0	**	**	85.7	100.0	100.0
Saskatoon CMA	18.2	4.5	7.6	7.6	28.8	27.3
10 - 49	10.9	0.0	0.0	2.2	10.9	17.4
50 - 89	**	**	**	**	**	**
90 or more	**	**	**	**	81.8	**
Rest of Saskatchewan	24.8	0.0	9.3	4.8	27.8	35.9
10 - 49	15.8	0.0	5.9	4.1	15.7	30.0
50 - 89	**	**	**	**	72.4	**
90 or more	**	**	**	**	**	**
Saskatchewan	**24.0**	**3.6**	**11.4**	**10.3**	**30.0**	**34.9**
10 - 49	13.7	0.0	4.0	4.1	13.7	26.0
50 - 89	**	9.1	22.8	9.1	68.0	**
90 or more	61.8	**	**	**	85.7	71.4

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

3.1 Average Rent ($) of Standard Spaces by Unit Type
Saskatchewan

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Regina CMA	**	**	3,098	3,233	3,468	3,657	4,170	4,316	3,388	3,549
Saskatoon CMA	**	**	2,658	2,677	2,541	2,725	3,016	3,146	2,628	2,746
Rest of Saskatchewan	**	**	2,413	2,383	2,776	2,937	**	3,746	2,494	2,575
Saskatchewan	**1,867**	**	**2,605**	**2,636**	**2,889**	**3,056**	**3,519**	**3,625**	**2,768**	**2,880**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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O1 Building Structure Makeup (%) Saskatchewan		
Centre	**Concrete Frame**	**Wood Frame**
Saskatchewan	**24.4**	**75.6**

O2 Ancillary Services, Cable and Telephone and Optional Costs (% of residences) Saskatchewan					
Centre	**Services**	**Included in Rent (%)**	**Tenant Arrange (%)**	**Optional (%)**	**Average Cost if Optional ($)**
Regina CMA	Cable	23.7	71.1	5.3	**
	Telephone	**	97.4	2.6	**
Saskatoon CMA	Cable	30.0	58.6	2.9	**
	Telephone	4.3	85.7	**	**
Rest of Saskatchewan	Cable	17.6	60.3	17.6	34.20
	Telephone	4.4	86.8	1.5	**
Total	**Cable**	**23.9**	**61.9**	**9.1**	**40.00**
	Telephone	**3.4**	**88.6**	**1.1**	**

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O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
Saskatchewan

Centre	Before 1990	1990 - 1999	2000 or Later	Total
Regina CMA	**	9.2	6.0	6.8
Saskatoon CMA	2.5	15.4	8.3	8.6
Rest of Saskatchewan	13.4	21.1	13.7	14.4
Saskatchewan	**5.7**	**14.2**	**10.0**	**10.3**

O3.2 Vacancy Rates (%) of Total Spaces[1] by Unit Type
Saskatchewan

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Regina CMA	**	**	7.5	4.7	11.5	7.1	11.6	5.0	9.6	5.8
Saskatoon CMA	**	**	8.3	9.0	5.7	4.9	4.3	1.3	6.6	5.8
Rest of Saskatchewan	**	**	12.4	14.6	11.4	17.4	**	16.7	12.5	15.5
Saskatchewan	****	****	**10.3**	**10.9**	**7.8**	**7.5**	**7.0**	**4.4**	**9.2**	**9.0**

[1] Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

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O3.3 Universe of Total Spaces[1] by Size of Residence Saskatchewan

Centre	< 50 Spaces		50 - 99 Spaces		100 + Spaces		Median
	Number of Residences	Total Spaces	Number of Residences	Total Spaces	Number of Residences	Total Spaces	Residence Size
Regina CMA	29	393	2	131	7	986	11
Saskatoon CMA	47	714	13	1,006	10	1,419	15
Rest of Saskatchewan	51	1,101	15	976	2	223	23
Saskatchewan	**127**	**2,208**	**30**	**2,113**	**19**	**2,628**	**20**

[1]Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

O3.4 Vacancy Rate (%) and Universe of Total Spaces[1] by Date Residence Opened Saskatchewan

Centre	Before 2001		2001 or Later		Total	
	Vacancy Rate	Universe	Vacancy Rate	Universe	Vacancy Rate	Universe
Regina CMA	8.2	402	4.9	1,108	5.8	1,510
Saskatoon CMA	4.7	1,844	5.7	1,295	5.1	3,139
Rest of Saskatchewan	19.4	691	12.1	1,609	14.3	2,300
Saskatchewan	**8.6**	**2,937**	**8.0**	**4,012**	**8.3**	**6,949**

[1]Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

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O4 Average Rents ($) of Standard Spaces by Date Residence Opened
Saskatchewan

Centre		Before 1990	1990 - 1999	2000 or Later	Total
Regina CMA	Semi-Private	**	**	**	**
	Bachelor	**	2,928	3,458	3,233
	One Bedroom	**	**	3,724	3,657
	Two Bedroom +	**	**	**	4,316
	Total	**	3,173	3,701	3,549
Saskatoon CMA	Semi-Private	**	**	**	**
	Bachelor	2,073	2,416	2,902	2,677
	One Bedroom	1,273	**	3,331	2,725
	Two Bedroom +	**	**	3,954	3,146
	Total	1,608	2,272	3,201	2,746
Rest of Saskatchewan	Semi-Private	**	**	**	**
	Bachelor	2,112	2,267	2,435	2,383
	One Bedroom	**	**	3,028	2,937
	Two Bedroom +	**	**	3,786	3,746
	Total	2,011	2,291	2,669	2,575
Total	**Semi-Private**	**	**	**	**
	Bachelor	**2,125**	**2,576**	**2,729**	**2,636**
	One Bedroom	**1,314**	**2,550**	**3,381**	**3,056**
	Two Bedroom +	**	**	**4,035**	**3,625**
	Total	**1,755**	**2,623**	**3,102**	**2,880**

O5 Number of Residents, Number of Residents Living Alone and Number of Residents in Heavy Care Units
Saskatchewan

Centre	2016	2017
Regina CMA		
Total number of residents	1,459	1,541
Number of residents living alone	1,275	1,274
Total number of couples	92	118
Number of residents in heavy care units	119	133
Saskatoon CMA		
Total number of residents	3,199	3,292
Number of residents living alone	2,560	2,609
Total number of couples	320	336
Number of residents in heavy care units	**	**
Rest of Saskatchewan		
Total number of residents	2,093	2,034
Number of residents living alone	1,939	1,831
Total number of couples	**	91
Number of residents in heavy care units	**	**
Saskatchewan		
Total number of residents	6,751	6,866
Number of residents living alone	5,774	5,714
Total number of couples	488	545
Number of residents in heavy care units	**	286

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Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized (in the Atlantic provinces, Quebec and Ontario);
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2015 to be included in the 2016 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard space: A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy care space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

Respite space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or subsidy space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

CMHC—HOME TO CANADIANS

Canada Mortgage and Housing Corporation (CMHC) has been Canada's national housing agency for almost 70 years.

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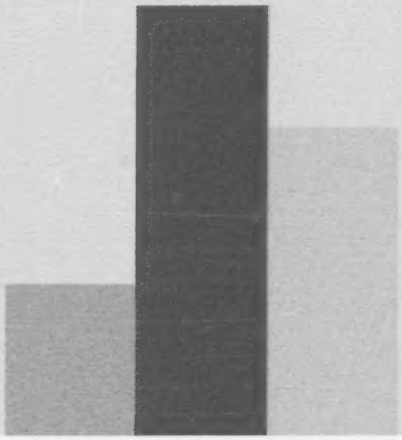

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